

Importing the AIRS/INFO LINE Taxonomy

The Alliance of Information & Referral Systems (AIRS) and 211 Los Angeles County produces a complete standardized Taxonomy that can be imported into IRis. This Taxonomy is not included within IRis - it must be purchased separately from AIRS/211 LA County (www.211taxonomy.com).

If you have a Taxonomy file other than the one supplied by AIRS/211 LA County, please contact our technical support staff for assistance.

The IRis Taxonomy Update Wizard is an application that enables the initial import or update of the AIRS/211 Taxonomy into IRis. The application uses a wizard-style interface to guide the user through the steps required to accomplish either task.

Before following this procedure, please ensure you have downloaded the Taxonomy file to your computer according to the instructions you received with your subscription.

It is recommended that you create a folder for the taxonomy update file outside the main IRis directory to use with the update wizard.

Download instructions are on the Download page on the Taxonomy website.

Minimum System Requirements

- Windows 95 or greater, Windows NT 4.0 SP 6A or greater
- Internet Explorer 5.0 or greater must be installed on the computer
- Microsoft .NET Framework 2.0 must be installed on the computer
- 64 Megs of memory or greater
- 300MHz processor or greater
- Mouse/VGA monitor

Installation

Once you have downloaded the Taxonomy Wizard setup files, follow these steps to complete the installation:

- Click on the Start button in Windows.
- Click Run.
- Click Browse and locate the setup.exe file in the directory where you saved the installation files.
- Click the Select button or double-click on the file name.
- Click the Open button and the installation program will launch.
- If you are directed to the Microsoft Website to install MS .net framework, select Redistributable versionx86. Download and install and then restart the Taxonomy Wizard installation.
- Click Next on the Welcome screen.
- Install the Wizard to the local hard drive on the machine from which the Wizard will be run. It can be installed to the IRis 3.0 workstation folder under C:\Programs or directly to the C: drive.
- Click Browse and locate your main IRis directory. If you downloaded to the main IRis directory, it should already be listed, and you can select OK.
- Click Next to leave the Select Installation Folder screen.
- Click Next to confirm the installation.
- Once the installation is completed, click Close to end the installation. You are now ready to run the Taxonomy Wizard.

The Taxonomy Wizard should be run from the workstation from which it has been installed. If it is necessary to run the wizard from a different workstation, an additional workstation setup may be needed. Please call IRis Technical Support (800) 335-8817 for assistance.

IMPORTANT: Please make sure that everyone has exited IRis before running the IRis Taxonomy Update Wizard. Exclusive use of the Taxonomy files is required while running the wizard.

Launch Wizard

This utility must be run from outside IRis. Please follow the following steps to launch the Wizard.

- Have everyone exit IRis.
- Have a complete backup of your data files stored somewhere.
- Click on the Start button in Windows.
- Click Run.
- Click Browse and locate the Taxonomyupdate.exe file in your main IRis directory.
- Click the Select button or double-click on the file name.
- Click the Open button and the wizard will launch.

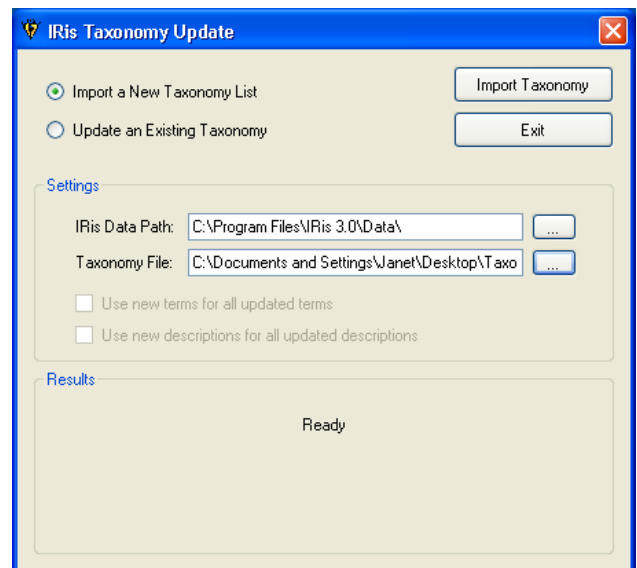
Import or Update Taxonomy Installation

There are 2 choices to choose from:

- Import a New Taxonomy List

This allows you to install a Taxonomy for the first time to IRis. It will not overwrite an existing Taxonomy installation. If you wish to overwrite and existing taxonomy, please call IRis Technical Support for assistance.
- Update an Existing Taxonomy

This allows you to update an existing taxonomy based on a change file supplied through the AIRS/211 subscription.



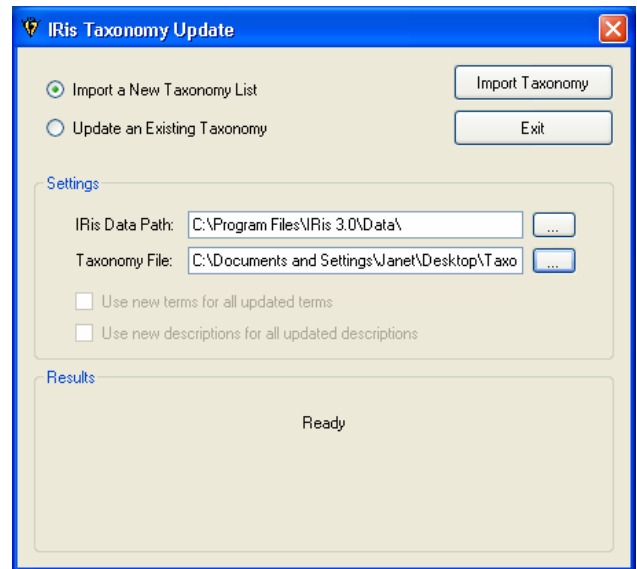
IMPORTANT! Data Sharer's Alert: If data is shared with others who maintain their own data, STOP at this point. All databases must be updated on the same schedule.

If data is shared with others who do not maintain their own data, please get exporting/importing instructions from IRis Technical Support.

Install a Taxonomy

This allows you to install a Taxonomy for the first time to IRis.

- Select Import a New Taxonomy List
- IRis Data Path - Browse to the data folder in your IRis installation if the path entered is not correct.
- Taxonomy File - Browse to the location of the taxonomy.xml file which you have downloaded from the Taxonomy website.
- Click the Import Taxonomy button.
- You will get a message when the import is complete asking if you would like to view the import log.
- Click OK to view the log.



This is a complete list in code order of all the taxonomy terms that have been imported. The log is stored as a PDF file in your main IRis directory. The file is time and date stamped.

Important Note: All terms are imported as inactive. To view the taxonomy in IRis, go to Resource Management>Taxonomy Codes. When the Taxonomy Maintenance window opens, click the Include Inactive Terms checkbox to view the list.

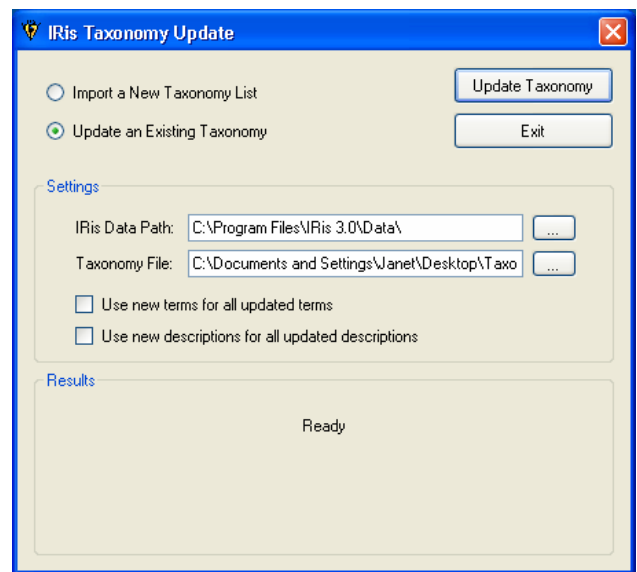
Update an Existing Taxonomy

This allows you to update an existing taxonomy based on a change file supplied through the AIRS/211 LA County subscription.

Note: A backup of all files associated with the taxonomy will be created before the update begins. This backup will be stored in a folder in your main IRis directory. The folder will be named TaxonomyBackup followed by the date and time of the backup.

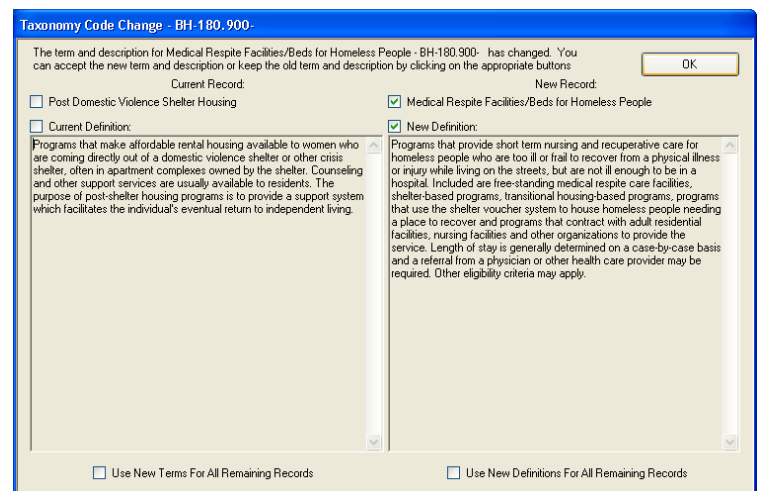
IMPORTANT: If you are using your own Taxonomy codes/terms in conjunction with the AIRS/211 Taxonomy, please contact IRis Technical Support **BEFORE RUNNING THE UPDATE WIZARD**. Failure to do so may result in loss of custom Taxonomy references.

- Select Update an Existing Taxonomy
- IRis Data Path - Browse to the data folder in your IRis installation if the path entered is not correct.
- Taxonomy File - Browse to the location of the taxonomy.xml file which you have downloaded from the Taxonomy website.
- Use new descriptions for all updated terms
Use new definitions for all updated terms.
 - IRis allows you to change the description and/or definition of a term to a custom description or definition. If you have made such changes and want to keep them, leave these two checkboxes unchecked.

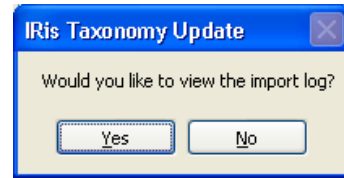


Data Sharer's Alert: Those who share data should not make any changes to the search terms without consulting with the sharing partners.

- Click the Update Taxonomy button
- If you have left the above described checkboxes unchecked, a window will open as the import runs showing each term that has had a description or definition changed.
 - Select the appropriate checkbox to accept or reject changes



- o At any time you can select Use New Descriptions For All Remaining Records and/or Use New Definitions For All Remaining Records.
- When the update is complete you will be asked if you would like to view the import log.
 - o Select Yes to view the log now
 - o Select No to view the log later
- Click the Exit button to close the wizard.



Import Log

The import log is stored as a PDF file in your main IRis directory. The file is time and date stamped. There are four sections.

- New Taxonomy Codes – This section lists all taxonomy terms added since you last updated your taxonomy. They are listed in code order and show the term, the definition and the date the code was created.
- Changed Taxonomy Codes – This section lists codes which have had a change to the code, a change to the term(description), and/or a change to the definition. Where a change has occurred both the old and new entries are listed. This section also shows the last date the code was modified.
- Deleted Taxonomy Codes – This section lists codes which have been removed from the taxonomy. For suggestions for substitutions for deleted codes you can go to the Taxonomy website and look for deleted codes in the Recent Changes section.

Note: As of July2007 Canadian and English terms can be downloaded separately. Users of English terms may note a large number of Canadian terms that have been deleted.

- Codes That Could Not Be Imported – This is list of codes that could not be imported into IRis because of the changes to the structure of the taxonomy which make them incompatible with IRis 3.0.

Effects of the Update

- Codes that have been deleted from the current Taxonomy list will be deleted from your database.
- Codes that have been added to the Taxonomy will be imported.
- Change codes/terms attached to Programs will be changed. Deleted codes will be removed.